



PaymentWorks Payer Reference

Initiator Manual: Sending and Tracking Invitations

Table of Contents

Part V: Sending and Tracking Invitations.....	3
1. Overview	3
How Does PaymentWorks Work?	3
2. How to Set Up an Initiator Account.....	4
3. Sending Invitations.....	6
Viewing the Message.....	7
4. Tracking Invitations.....	9
Expanding Invitations	9
Onboarding Statuses	11
5. The NVR Process	12
6. Managing your Account.....	18

Part V: Sending and Tracking Invitations

1. Overview

Your organization's finance department has selected PaymentWorks as a tool to manage supplier information. The PaymentWorks platform creates efficiency in the process of obtaining business details and payment information from your organizations' vendors. In turn, vendors can submit and update their business information as necessary, as well as inquire about payments.

How Does PaymentWorks Work?

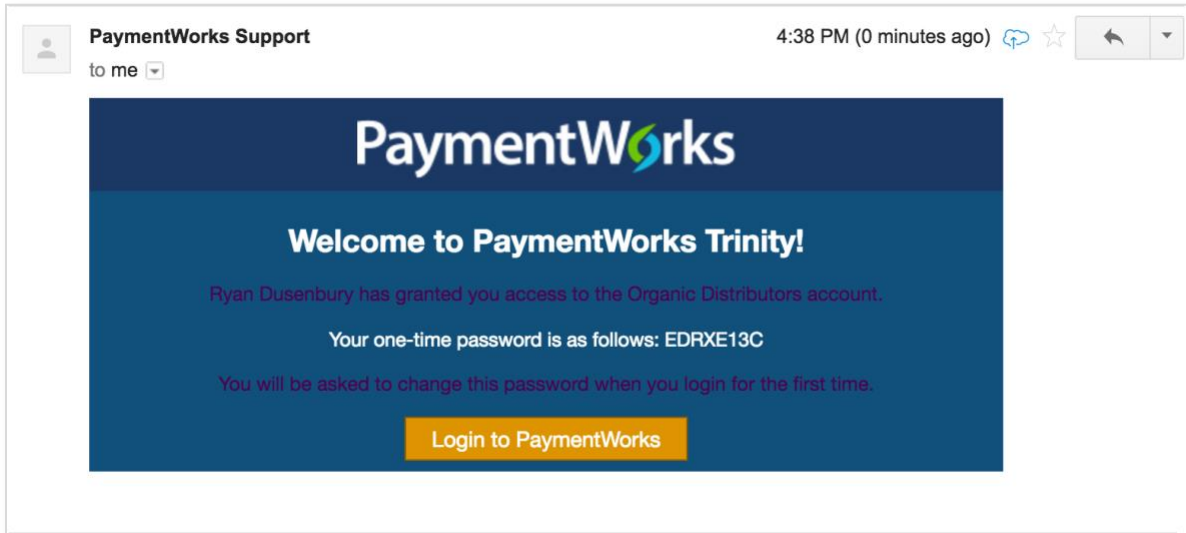
PaymentWorks is a platform through which your organization's finance department can "connect" with its new and existing vendors. Approved personnel can send invitations to new vendors so they can create an account and make a connection on PaymentWorks. Once vendors complete the registration and connection process, and when their registration is approved, they will be able to view invoice and payment related updates, while providing your finance department with their latest profile information.

As an initiator in PaymentWorks, you can to send out requests to prospective vendors so they can go through the registration process. You can do this through invitations that you send using the vendor's e-mail address. Once you send an invitation, the vendor will have the opportunity to complete a New Vendor Registration form and submit their information. More details on this process are covered in Sections 3 and 4 of this document.

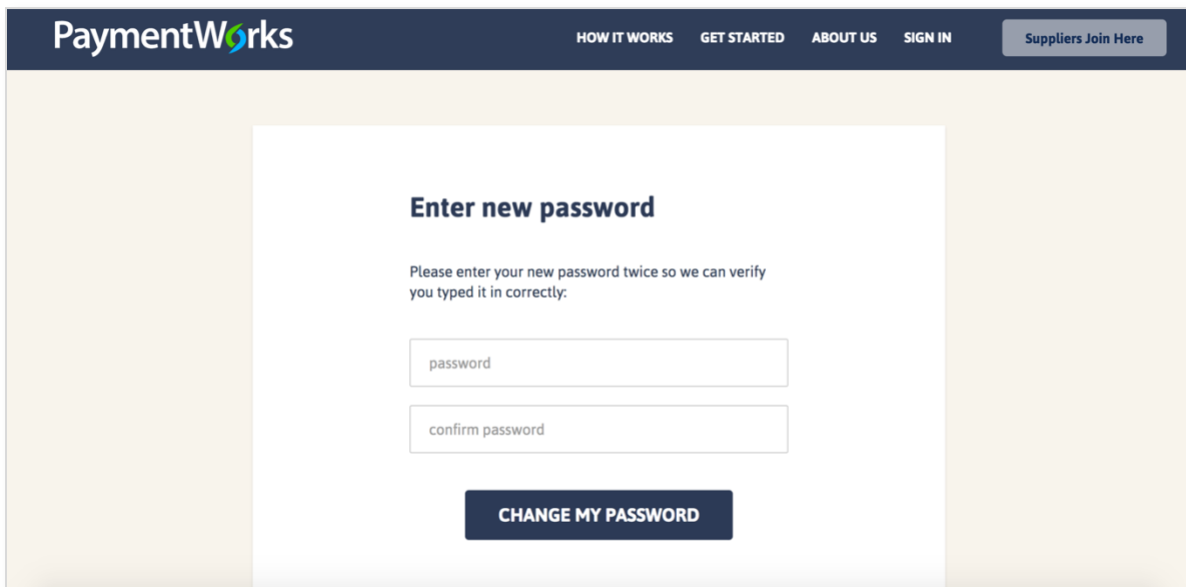
If you have any questions about PaymentWorks, please contact the finance department at your organization.

2. How to Set Up an Initiator Account

To set up an initiator account, your finance department must first invite you to join your organization's PaymentWorks account. You should receive an e-mail from PaymentWorks Support granting you access to your organization's PaymentWorks account. Click on the "Log in to PaymentWorks" button at the bottom of the e-mail. Log in with your username (the e-mail address to which the invitation was sent) and the one-time password included in the e-mail.



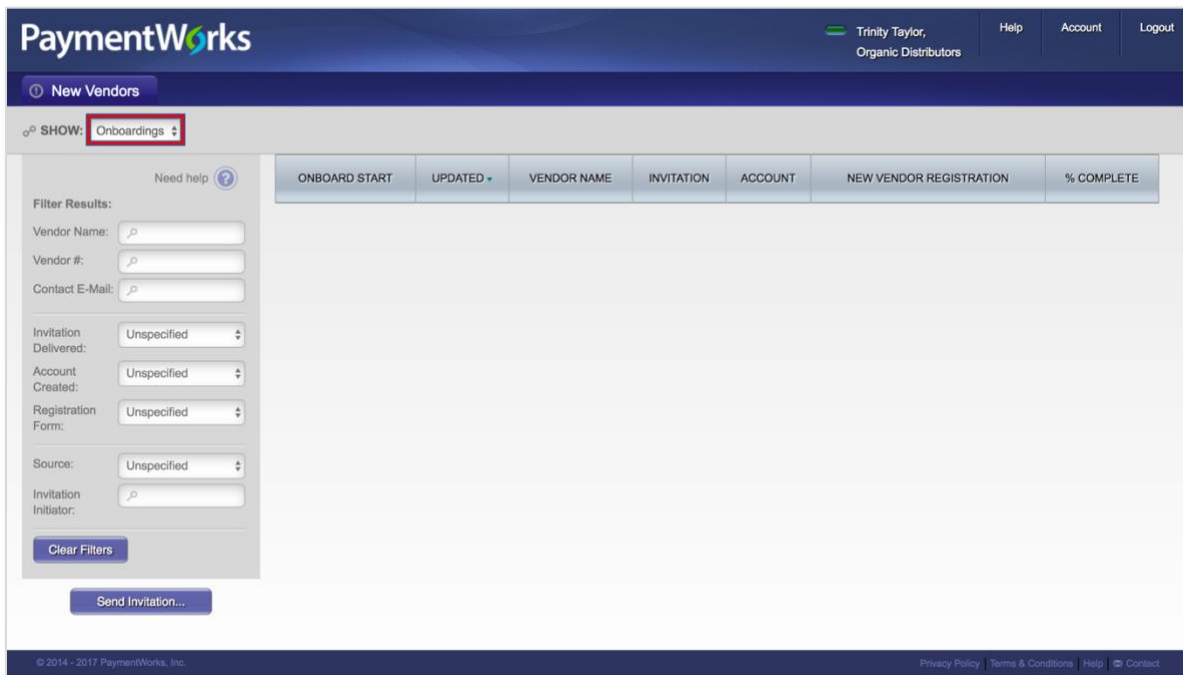
Once you log in, you will be prompted to create a new password that you will use to log in in the future.



After you create a password, you will be able to log in and begin using the Initiator application. When you log in, the following screen will appear. Depending on what permissions you are granted, you may also be able to toggle between the “Onboardings” view and the “Requests” view by clicking where the red box is shown below.

- Onboardings is a record of invitations sent out.
- Requests is a view of all completed and submitted registrations

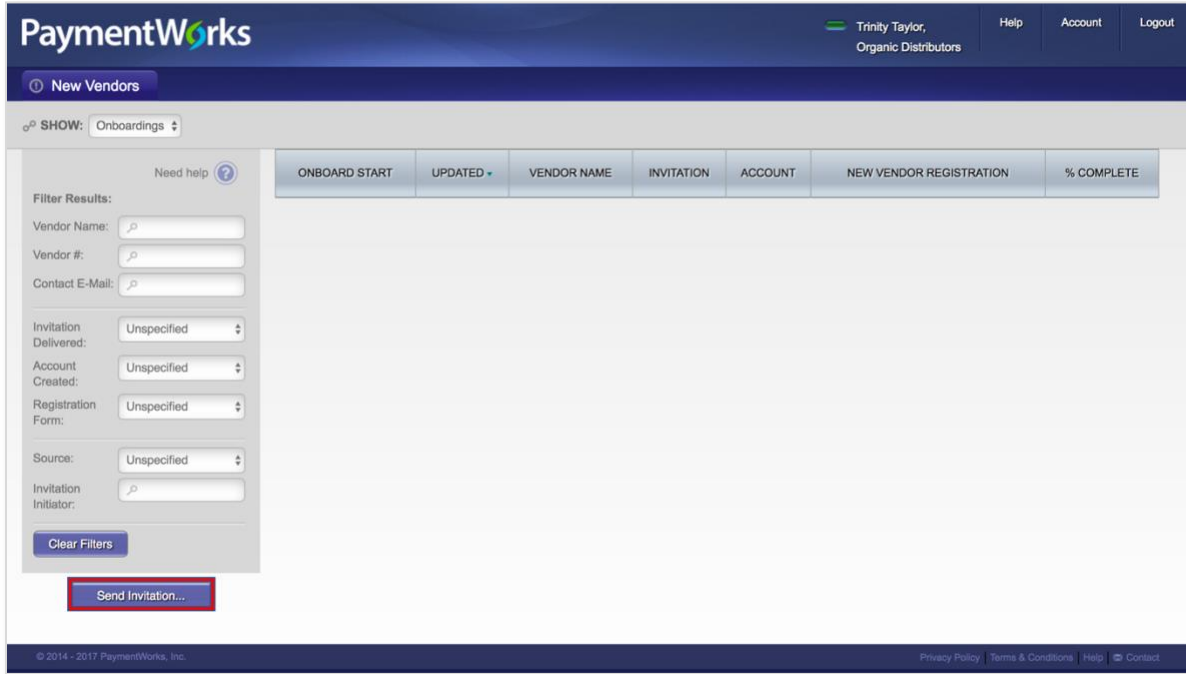
Note: Some organizations allow their vendors to register through a public landing page. The Onboardings view will show you which vendors have registered via the landing page, where they will appear as “Self-registered”. The public landing page is described further in Section 5 of this document.



Now, you will be able to send and resend requests to vendors, track these requests, and filter results to look up specific vendors or onboarding statuses. These features are described in further detail in the sections below.

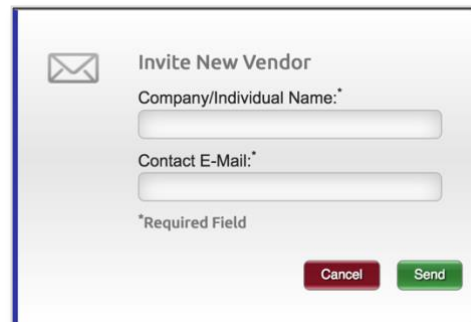
3. Sending Invitations

You can initiate the new vendor registration process by sending an invitation to the prospective vendor. You can do this by clicking on the **Send Invitation** button at the bottom of the left sidebar.



The screenshot to the right shows the standard initiation form. There may be additional fields in this invitation dialog box that have been set up by your finance department, which may be necessary to send an invitation (e.g. a memo, or other information about the vendor).

If additional values are supplied in the invitation dialog box, only the finance department will see responses. Your prospective vendor will not see these values.



Adding Personal Messages to Invitations

PaymentWorks offers the ability for invitations to include a personal message from the sender (also referred to as the “Initiator”) to the prospective vendor.

If the Personal Message feature has been enabled in your account, Initiators will see a new text box at the bottom of the dialog box displayed for providing invitation information.

The screenshot at right shows a simple version of the Initiator dialog box, which contains no custom fields. The maximum length of a personal message is 280 characters.

If your organization includes additional fields for the Initiator to provide, they will appear above the Personalized Message, which will always be displayed at the bottom of the dialog box.

Viewing the Message

When the invitation has been sent, the personal message will be captured and displayed in Onboardings, in the expanded record view, as shown below:

The screenshot shows a dialog box titled "Invite New Vendor" with an envelope icon. It contains three input fields: "Company/Individual Name:" (with "Gastro Catering"), "Contact E-Mail:" (with "gastrocatering@gmail.com"), and "Personalized Message:" (with a message to Pierre). A legend indicates that the asterisk on the first two fields denotes a "Required Field". At the bottom are "Cancel" and "Send" buttons.

PaymentWorks Vendor Master Updates

Amelia Boynton, Waltham College Help Account Logout

Home Vendor Profiles Updates New Vendors Reimbursements

SHOW: Onboardings

VIDEO TUTORIAL

Filter Results:

Vendor Name:

Vendor #:

Contact E-Mail:

Invitation Approval:

Invitation Delivered:

Account Created:

Registration Form:

Source:

Invitation Initiator:

Clear Filters

Send Invitation...

ONBOARD START	UPDATED	VENDOR NAME	INVITATION	VENDOR ACCOUNT	NEW VENDOR REGISTRATION	% COMPLETE
Invitation Details: close X						
Initiator: Amelia Boynton (tad+waltham@paymentworks.com)		Vendor Name: Contact E-mail: Gastro tad+gastro@paymentworks.com Catering		Initiated: 02/01/2018		Email Sent: 02/01/2018
Personalized Message: Pierre, the link in this message will take you to our vendor registration form. After you complete and submit the form, it will go through our approval process. Thanks, Amelia						
				Cancel Reminders		Resend Invitation
12/08/2017	12/08/2017	Recycled Cycles	Clicked	Email Validated	Submitted	<div style="width: 100%; height: 10px; background-color: #007bff;"></div>
12/07/2017	12/07/2017	Coffee Bean, Inc.	Clicked	Email Validated	Submitted	<div style="width: 100%; height: 10px; background-color: #007bff;"></div>

If you resend the invitation, the most recent message will appear in the expanded record, as shown above.

4. Tracking Invitations

The screenshot shows the 'New Vendors' page in the PaymentWorks system. The page header includes the user name 'Ryan Duse, Organic Distributors' and navigation links for 'Help', 'Account', and 'Logout'. The main content area features a table of vendor onboarding records and a filter sidebar on the left.

ONBOARD START	UPDATED	VENDOR NAME	INVITATION	ACCOUNT	NEW VENDOR REGISTRATION	% COMPLETE
05/12/2017	05/12/2017	Panama Auto	Delivered	No Account	Not Started	<div style="width: 25%;"></div>
05/12/2017	05/12/2017	Queen Elizabeth II	Clicked	Confirmed	Submitted	<div style="width: 75%;"></div>
05/11/2017	05/12/2017	Malibu Rum	Clicked	Confirmed	Not Started	<div style="width: 50%;"></div>
05/11/2017	05/12/2017	Malibu Rum	Cancelled	No Account	Not Started	<div style="width: 0%;"></div>
05/12/2017	05/12/2017	Headphones Distributor	Clicked	Confirmed	Not Started	<div style="width: 30%;"></div>

The filter sidebar on the left includes fields for Vendor Name, Vendor #, Contact E-Mail, Invitation Delivered, Account Created, Registration Form, Source, and Invitation Initiator. A 'Send Invitation...' button is located at the bottom of the filter section.

When you start sending invitations, they will appear as shown above. You can use the controls on the left side of the page to filter the list of new vendor onboardings. For example, if you wanted to look up the status of an invitation to the e-mail address `bobsmith@mail.com`, you can type that e-mail address in the Contact E-mail field. If an invitation has gone out to that address, the page will only display invitations that have gone out to that address.

This screenshot shows the same 'New Vendors' page, but with a filter applied to the 'Contact E-Mail' field. The filter value is 'ryan.dusenbury+panar'. The table now displays only one record corresponding to this filter.

ONBOARD START	UPDATED	VENDOR NAME	INVITATION	ACCOUNT	NEW VENDOR REGISTRATION	% COMPLETE
05/12/2017	05/12/2017	Panama Auto	Clicked	Created	Not Started	<div style="width: 25%;"></div>

The 'Contact E-Mail' field in the filter sidebar is highlighted with a yellow background and contains the text 'ryan.dusenbury+panar'. The 'Send Invitation...' button remains visible at the bottom of the filter section.

Expanding Invitations

More information is available on each invitation by clicking the appropriate links displayed in various columns.

More Information Regarding the Invitation

The screenshot shows the PaymentWorks 'New Vendors' interface. A modal window titled 'Invitation Details' is open, displaying the following information:

ONBOARD START	UPDATED	VENDOR NAME	INVITATION	ACCOUNT	NEW VENDOR REGISTRATION	% COMPLETE
05/12/2017	05/12/2017	Queen Elizabeth II	Clicked	Confirmed	Submitted	<div style="width: 100%;"></div>
05/11/2017	05/12/2017	Malibu Rum	Clicked	Confirmed	Not Started	<div style="width: 100%;"></div>
05/11/2017	05/12/2017	Malibu Rum	Cancelled	No Account	Not Started	<div style="width: 100%;"></div>
05/12/2017	05/12/2017	Headphones Distributor	Clicked	Confirmed	Not Started	<div style="width: 100%;"></div>

The modal also includes a 'Filter Results' section on the left with search fields for Vendor Name, Vendor #, and Contact E-Mail, and dropdown menus for Invitation Delivered, Account Created, Registration Form, and Source. A 'Send Invitation...' button is at the bottom of the filter section. The modal itself has 'Cancel Reminders' and 'Resend Invitation' buttons.

When you click on a link in the Invitation column, you will be able to expand that invitation and view the details of the invitation that was sent.

These details include:

- Name and e-mail address of the initiator
- Name of the Vendor, as you filled out in the invitation
- E-mail address of the vendor to which the invitation was sent
- Date the invitation was first sent
- Date the invitation was last sent (will only differ from First Sent if the invitation was resent)

If the prospective vendor has not clicked the invitation, you can resend the invitation, and cancel future reminders to that vendor about completing their registration.

When you click on the “Resend Invitation” button, the same screen will appear as when you went to send the invitation the first time. Here you will have a chance to edit the e-mail address and/or name of the prospective vendor. Once a vendor opens the e-mail, the option to Resend (as well as cancel reminders) is not available.

Note: Once you cancel reminders, you cannot re-enable them, but you can re-send invitations.

More Information Regarding Account

The screenshot shows the PaymentWorks interface for managing vendors. The top navigation bar includes the logo, user name (Ryan Duse, Organic Distributors), and links for Help, Account, and Logout. The main content area is titled 'New Vendors' and shows a table of vendor onboarding progress. A sidebar on the left contains filter options for Vendor Name, Vendor #, Contact E-Mail, Invitation Delivered, Account Created, Registration Form, Source, and Invitation Initiator. A 'Send Invitation...' button is located below the filters. The table has columns for ONBOARD START, UPDATED, VENDOR NAME, INVITATION, ACCOUNT, NEW VENDOR REGISTRATION, and % COMPLETE. An 'Account Details' pop-up window is open, showing information for user Ryan D, including email, company name (Panama Auto), and account creation date (05/12/2017).

ONBOARD START	UPDATED	VENDOR NAME	INVITATION	ACCOUNT	NEW VENDOR REGISTRATION	% COMPLETE
Account Details: close						
User Name: Ryan D	User E-mail: ryan.dusenbury+panama@paymentworks.com	Company Name: Panama Auto	Account created: 05/12/2017			
05/12/2017	05/12/2017	Headphones Distributor	Clicked	Confirmed	Not Started	<div style="width: 100%;"></div>
05/12/2017	05/12/2017	Queen Elizabeth II	Clicked	Confirmed	Submitted	<div style="width: 100%;"></div>
05/11/2017	05/12/2017	Malibu Rum	Clicked	Confirmed	Not Started	<div style="width: 100%;"></div>
05/11/2017	05/12/2017	Malibu Rum	Cancelled	No Account	Not Started	<div style="width: 100%;"></div>

The account column will show links, like in the Invitation column, but the statuses in this column are different than the statuses in the Invitation column. When you click on the link in the Account column, you can view the details your prospective vendor submitted to create their PaymentWorks account. These details include:

- Name on the account
- E-mail associated with the user
- Company of the user
- Date account was created

Important Note: A vendor needs to create a PaymentWorks account as well as submit a New Vendor Registration to complete the onboarding process. Creating an account does not mean the vendor is finished with the new vendor registration process. Details on statuses for each column are shown in the next subsection.

Onboarding Statuses

Possible statuses in the Invitation column

- **Invitation Sent:** This just acknowledges that the invitation was sent. If the date is more than a day old, the email was probably not delivered. In these cases, you might need to check that the email address was correct.
- **Invitation Delivered:** The invitation was delivered to the vendor's email server. In this status, the recipient has not opened the email. If it remains in this status for long, the vendor might have to check their Spam or Junk folder.

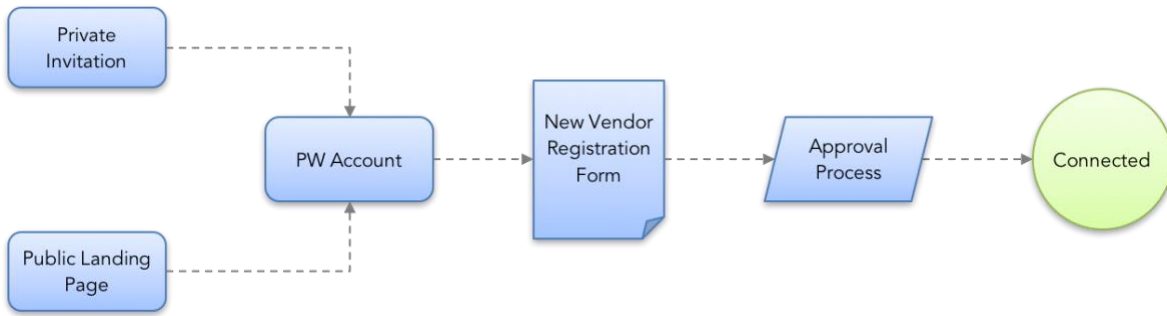
- **Invitation Not Deliverable:** The vendor’s email server rejected the invitation. This status is quite rare. In this case, we might have to try a different email address, or get the vendor’s IT department to “white list” paymentworks.com (i.e. allow the PaymentWorks e-mail address to go through their server).
- **Invitation Opened by Recipient:** The vendor has seen and opened the email, but they have not yet clicked the link to begin the onboarding.
- **Invitation Link Clicked:** The vendor opened the email and followed the link to PaymentWorks. This status shouldn’t appear for long, because the next step is simply to create a PaymentWorks account. Please note that once a vendor clicks an invitation, you can no longer re-send the invitation.
- **Self-Registered:** The vendor went to the Payer’s Public landing page - e.g. www.paymentworks.com/company - and joined PaymentWorks from there.

Possible Statuses in the New Vendor Registration column

- **New Vendor Registration Submitted:** The vendor has submitted the form but it hasn’t been processed. You would see these under New Vendor Requests as “Pending”.
- **New Vendor Registration Approved:** The Finance department has approved the form. This is redundant with Approvals shown under New Vendor Requests
- **New Vendor Registration Processed:** The form has been processed and sent to your organization’s financial system. This is redundant with Approvals shown under New Vendor Requests
- **New Vendor Registration Complete:** The form has been received and the vendor connection made. This is the same as status = “Connected” under New Vendor Requests. If the vendor is still asking what to do, you might want to suggest they login to PaymentWorks and check their Invoices tab.
- **New Vendor Registration Rejected:** Your Finance Department has rejected the submitted form. This is redundant with Rejected shown under New Vendor Requests
- **Invitation/Reminders Cancelled:** Someone from the Payer has clicked the “Cancel Reminders” link for that vendor.

5. The NVR Process

The following section outlines the steps a vendor you have invited will take to register and connect with your organization on PaymentWorks. This is included for insight into the onboarding process, should you receive any questions from your vendor about completing their New Vendor Registration. A visual overview of the process is included below:

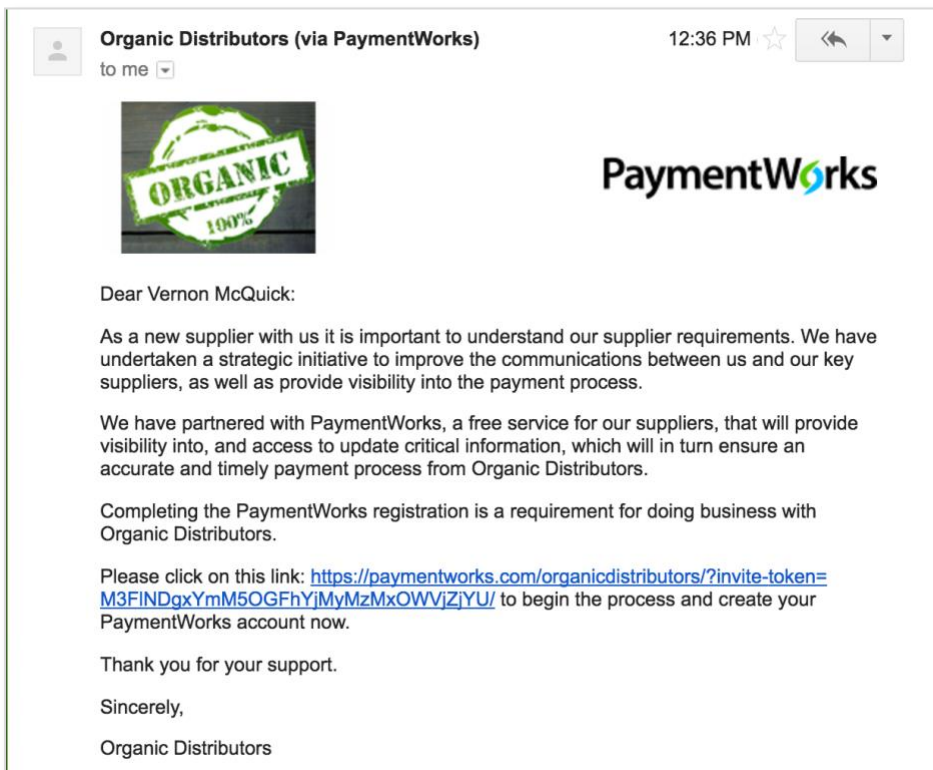


Note: some organizations have a Public Landing Page where vendors can access the registration process. These vendors go through the same process described below, except they do not use an invitation to connect. You may or may not have access to view the vendors registering via the landing page.

Vendors who register through your organization’s landing page will have the value “Self-Registered” in the invitation column.

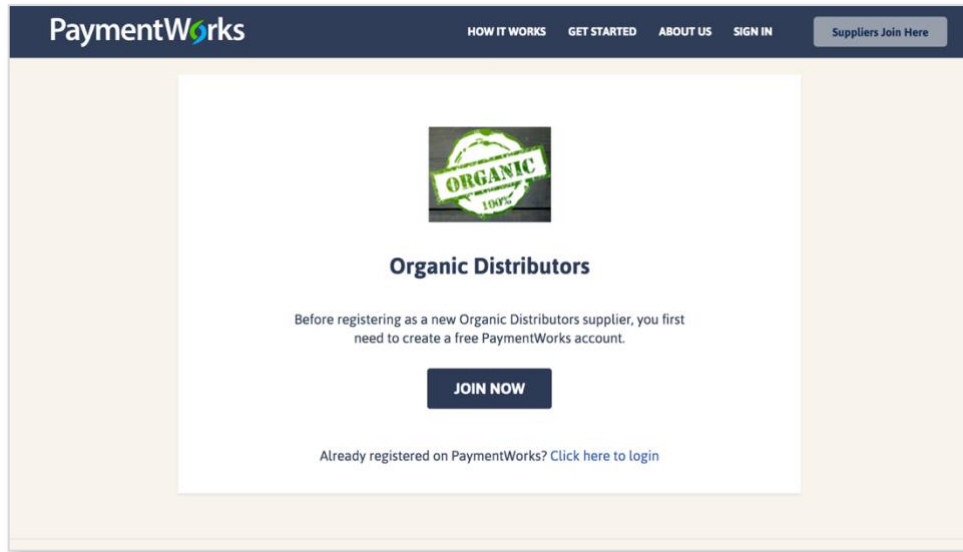
Step 1: The Vendor Receives the Invitation

First, the invitation they receive will look something like the screen shot that is shown below. This message is configured by the finance department, but always includes a special link at the bottom.



Step 2: Joining PaymentWorks

When the vendor clicks the special link, they will be prompted to a screen that invites them to join PaymentWorks. From there, they can either create a new account (if they have created an account in PaymentWorks) or log in to their existing accounts (if they are connected with another customer on PaymentWorks).



From there, they will create an account. The simple PaymentWorks registration form is shown below.

Payees (Suppliers)
Join PaymentWorks for Free


Personal Information

First Name Last Name

Company Name

Title

Email

 Telephone

Create Password

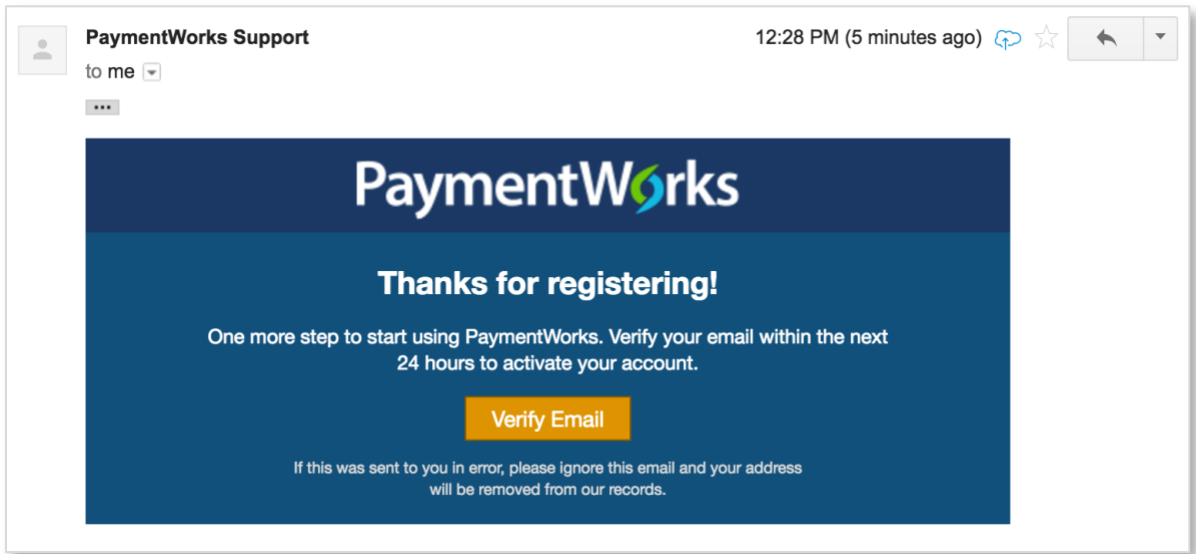
Password

Confirm Password

I agree to the [terms of service](#)

JOIN NOW

The invited vendor will receive an e-mail enabling them to verify their account. Once they click the “Verify E-mail” button, as shown in the screenshot below, they will be able to log in to their PaymentWorks account. A vendor cannot access their account if they do not verify their e-mail.



Once they log in, they will be prompted to fill out your company's New Vendor Registration form and submit it. Once submitted and then approved by your organization's finance department, the connection process will be complete.

Step 3: The New Vendor Registration Form

After the vendor has joined PaymentWorks and confirmed their PaymentWorks account, the next time they login they will see your organization's new vendor registration form.

Through this form (sample screenshot below), vendors will provide their business profile information, including their address, their tax information such as EIN (for businesses) or SSN (for individuals), as well as a W9 form (or similar for international vendors).

Your organization may also require the prospective vendor to submit bank account information to enable electronic payments.

Organic Distributors

New Vendor Registration



Please fill out and submit the following form. The information you provide will be submitted to Organic Distributors and you will be notified by email when your application is processed. Once you are approved as a new vendor of Organic Distributors, you will immediately be able to see the status of all invoices you have submitted to Organic Distributors.

All fields marked with a red asterisk (*) are required fields. All other fields are optional.

Business, Trade or DBA Name:*
(If you do not have a separate business, trade or DBA name, use your first & last name)

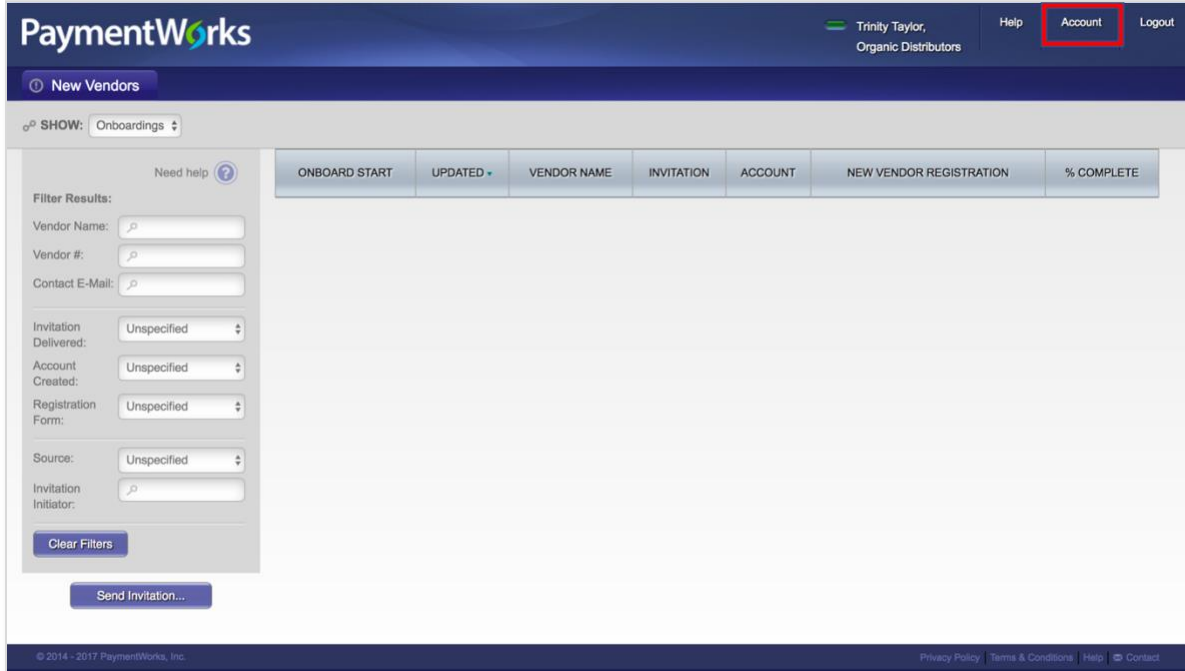
Telephone:*

Preferred e-Mail:*

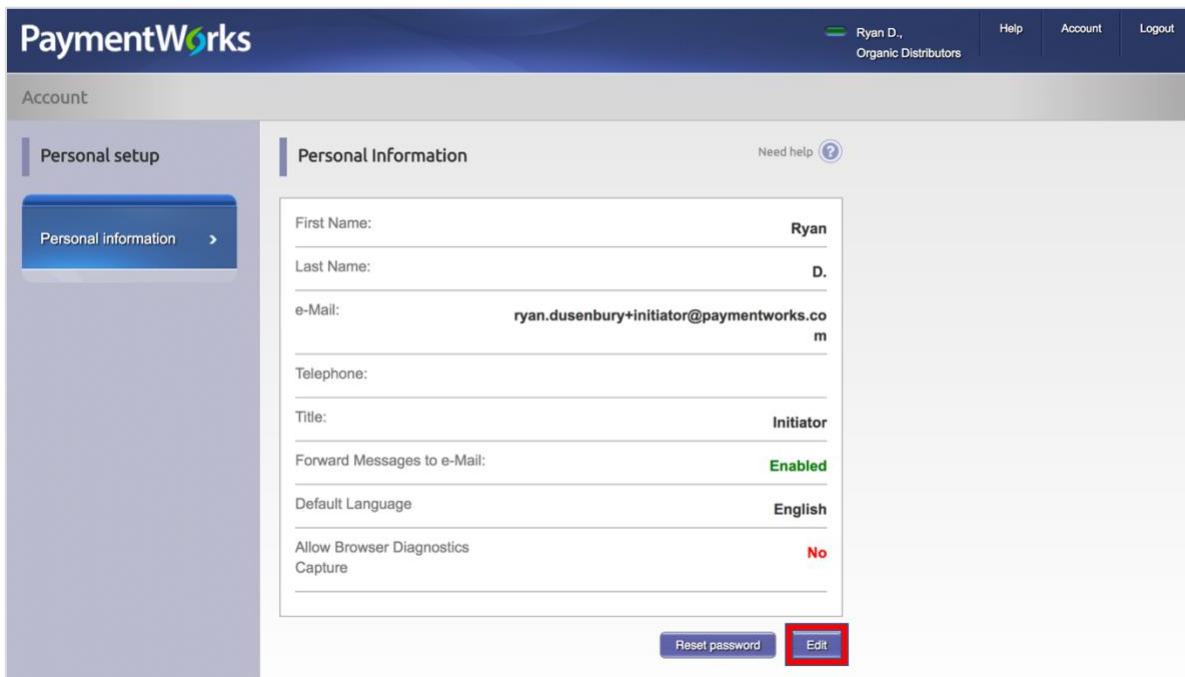
Website URL (where applicable):

Description of Goods/Services Being Provided:

6. Managing your Account

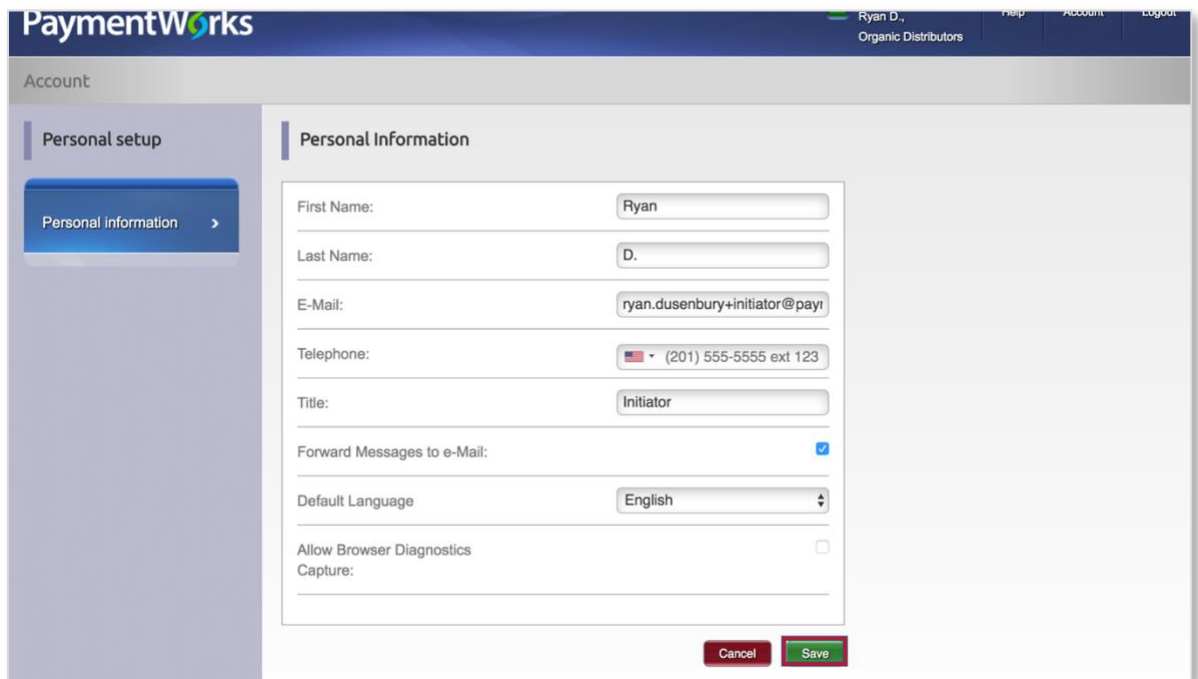


At the top right of the homepage, you will see “Account”. Clicking this will allow you to edit the information associated with your account, as well as reset your password. If you wish to edit your information, click the edit button shown below.



You can change:

- First and Last Name
- The e-mail address at which you wish to have associated with your PaymentWorks account
- Phone number
- Title at the company
- Permission to have messages forwarded to e-mail (recommended)
- Default Language
- Permission for PaymentWorks to capture browser information (recommended)



The screenshot displays the PaymentWorks account management interface. At the top, the PaymentWorks logo is on the left, and the user's name 'Ryan D., Organic Distributors' along with 'Help', 'Account', and 'Logout' links are on the right. Below the header, the 'Account' section is visible. On the left side, there is a 'Personal setup' menu with a 'Personal information' link. The main content area is titled 'Personal Information' and contains a form with the following fields:

First Name:	<input type="text" value="Ryan"/>
Last Name:	<input type="text" value="D."/>
E-Mail:	<input type="text" value="ryan.dusenbury+initiator@payi"/>
Telephone:	<input type="text" value="(201) 555-5555 ext 123"/>
Title:	<input type="text" value="Initiator"/>
Forward Messages to e-Mail:	<input checked="" type="checkbox"/>
Default Language	<input type="text" value="English"/>
Allow Browser Diagnostics Capture:	<input type="checkbox"/>

At the bottom right of the form, there are 'Cancel' and 'Save' buttons.

Be sure to press save when you are finished changing your information.